AMIS USER TUTORIALS ADMINISTRATOR

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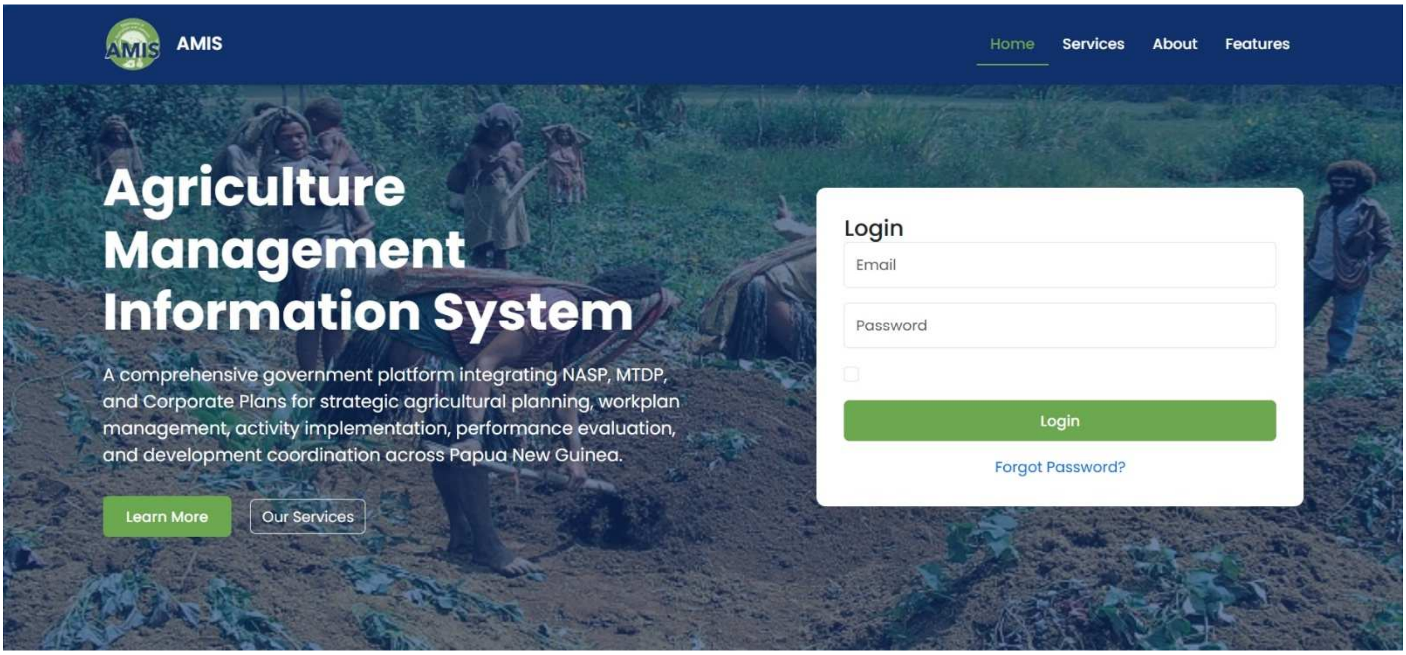

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AMIS User Tutorial - System Administrator

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Part 1: User Journey Mapping

Introduction

Welcome to the AMIS System Administrator Tutorial. As a System Administrator, you have full access to all features and capabilities within the Agricultural Management Information System (AMIS). This tutorial will guide you through every aspect of the system, from basic navigation to advanced administrative functions.

Your Role and Responsibilities

As a System Administrator, you are responsible for:

- **System Configuration:** Managing master data, branches, regions, and government structure
- **User Management:** Creating, activating, and managing user accounts and permissions
- **Strategic Planning:** Managing MTDP, NASP, and Corporate Plans
- **SME Management:** Registering and managing Small and Medium Enterprises
- **Full Activity Access:** Creating, implementing, supervising, and evaluating all activities
- **Comprehensive Reporting:** Accessing all reports and analytics across the system
- **System Oversight:** Monitoring system usage, performance, and data quality

System Goal

The primary objective of AMIS is to **Monitor and Measure the effectiveness of activities implemented and how they contribute to achieving the targets in the plans**. As an administrator, you play a crucial role in ensuring the system supports this goal through proper configuration, data management, and user enablement.

Login Process

Step-by-Step Login Instructions

1. **Open Your Web Browser**
    - Recommended browsers: Chrome, Firefox, Edge, or Safari (latest versions)
    - Minimum screen resolution: 1024x768 (1920x1080 recommended)
2. **Navigate to the AMIS Login Page**
    - URL: `https://amis.agriculture.gov.pg/`
3. **Enter Your Credentials**
    - **Email Address:** Enter your registered email address
    - **Password:** Enter your password (case-sensitive)
    - **Remember Me:** Check this box if using a personal, secure device (optional)
4. **Click the "Login" Button**
    - The system will authenticate your credentials
    - If successful, you'll be redirected to the Dashboard
    - If unsuccessful, you'll see an error message

Login Troubleshooting

Problem: "Invalid email or password" error

- **Solution:** Verify your email address is correct and password is entered accurately
- Check if Caps Lock is on
- Contact another administrator if you've forgotten your password

Problem: "Your account is not active" error

- **Solution:** Your account needs to be activated by another administrator
- Contact the system administrator or IT support

Problem: Session expired message

- **Solution:** Your session has timed out (default: 2 hours of inactivity)
- Simply log in again with your credentials

Security Best Practices

- **Never share your password** with anyone
- **Use a strong password** with a mix of uppercase, lowercase, numbers, and special characters
- **Log out** when finished, especially on shared computers
- **Change your password regularly** (recommended: every 90 days)
- **Only use "Remember Me"** on personal, secure devices

Dashboard Overview

After successful login, you'll land on the Dashboard - your central hub for accessing all AMIS features.

Dashboard Layout

Top Navigation Bar

Located at the very top of the page:

- **AMIS Logo and Title:** Click to return to dashboard from anywhere
- **Hamburger Menu Icon (☰):** Toggle sidebar visibility
- **User Profile Dropdown (Top Right):**
  - Your name and role
  - Profile link
  - Logout option

Welcome Section

The main dashboard displays:

Welcome Card (Blue Header):

- **Greeting:** "Welcome, [Your Name]!"
- **Role Badge:** Shows "User" (your base role)
- **Admin Badge:** Red badge with shield icon indicating administrator privileges
- **Additional Badges:** May show "Supervisor" or "Evaluator" if you have those capabilities

Dashboard Widgets:

- **My Workplans:** Count and list of workplans you've created or are assigned to
- **Pending Tasks:** Number of activities awaiting your approval (as supervisor)
- **Completed Tasks:** Number of approved/rated activities
- **Quick Action Buttons:** Links to frequently used features

Left Sidebar Menu

Your navigation menu with all available features (detailed in Navigation Map section below).

Dashboard Metrics

As an administrator, your dashboard shows:

- **System-wide metrics** (if configured)
- **Your personal workplans** and activities
- **Pending approvals** for activities you supervise
- **Quick access** to administrative functions

Dashboard Tips

- **Refresh the dashboard** to see updated metrics
- **Click on metric cards** to navigate to detailed views
- **Use the sidebar** for primary navigation
- **Collapse the sidebar** (click ☰) for more screen space
- **Check pending tasks regularly** to ensure timely approvals

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Navigation Map

As a System Administrator, you have access to ALL menu items in AMIS. Here's your complete navigation structure:

Main Menu Items

1. Dashboard

- **Icon:** Speedometer
- **Access:** All users
- **Purpose:** Central hub with metrics and quick access
- **URL:** `/dashboard`

2. Admin Panel (Submenu)

- **Icon:** Gear/Cog
- **Access:** Administrators only
- **Purpose:** System administration and master data management
- **Submenus:**
  - **Users:** Manage user accounts, roles, and permissions
  - **Regions:** Manage regional divisions
  - **Gov. Structure:** Manage provinces, districts, LLGs, and wards
  - **Branches:** Manage organizational branches/divisions
  - **MTDP Plans:** Manage Medium Term Development Plans
  - **NASP Plans:** Manage National Agriculture Sector Plans
  - **Corporate Plans:** Manage organizational corporate plans

3. SMEs

- **Icon:** Store
- **Access:** Administrators only
- **Purpose:** Small and Medium Enterprise management
- **URL:** `/smes`

4. Workplans

- **Icon:** Tasks
- **Access:** Administrators and Supervisors
- **Purpose:** Create and manage workplans
- **URL:** `/workplans`

5. Supervised Activities

- **Icon:** Clipboard List
- **Access:** Administrators and Supervisors
- **Purpose:** View and manage activities you supervise
- **URL:** `/supervised-activities`

6. Evaluation

- **Icon:** Clipboard Check
- **Access:** Administrators and Evaluators
- **Purpose:** Evaluate and rate activities
- **URL:** `/evaluation`

7. My Activities

- **Icon:** Briefcase
- **Access:** All users
- **Purpose:** Create and manage your own activities
- **URL:** `/activities`

8. Duty Instructions

- **Icon:** Tasks
- **Access:** All users (except guests)
- **Purpose:** Create and manage duty instructions
- **URL:** `/duty-instructions`

9. Reports (Submenu)

- **Icon:** Chart Bar
- **Access:** All users
- **Purpose:** Access various reports and analytics
- **Submenus:**
  - **MTDP Report:** Medium Term Development Plan reporting
  - **NASP Report:** National Agriculture Sector Plan reporting
  - **Corporate Plan Report:** Corporate plan implementation reporting
  - **Workplan Report:** Workplan progress and analysis
  - **Activities Maps:** Geographic visualization of activities
  - **HR Report:** Human resources analytics

- **Gov. Structure Report:** Government structure analysis
- **Statistics:** Comprehensive statistics dashboard

10. Profile

- **Icon:** User
- **Access:** All users
- **Purpose:** View and edit your profile
- **URL:** `/profile`

Navigation Tips

- **Hover over menu items** to see tooltips
- **Click submenu headers** to expand/collapse submenus
- **Active menu items** are highlighted
- **Use breadcrumbs** at the top of pages to track your location
- **Back buttons** are available on most pages to return to previous views

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Typical Workflows

As a System Administrator, here are the most common workflows you'll perform:

Workflow 1: Setting Up a New User

Purpose: Create and activate a new user account

Steps:

1. Navigate to **Admin Panel → Users**
2. Click **"New User"** button
3. Fill in user details (name, email, branch, role)
4. Assign capabilities (Admin, Supervisor, Evaluator checkboxes)
5. Click **"Create User"**
6. System sends activation email to user
7. User clicks activation link in email
8. Return to **Admin Panel → Users**
9. Find the user and click **"Activate"**
10. User can now log in

Outcome: New user has access to AMIS based on assigned role and capabilities

Workflow 2: Creating Strategic Plans

Purpose: Set up MTDP, NASP, or Corporate Plans for activity linkage

Steps:

1. Navigate to **Admin Panel → [Plan Type]** (MTDP/NASP/Corporate Plans)
2. Click **"New Plan"** button
3. Enter plan details (name, description, dates)
4. Click **"Create Plan"**
5. Add plan hierarchy (objectives, KRAs, strategies, indicators)
6. Save each level of the hierarchy
7. Review complete plan structure

Outcome: Strategic plan is available for linking to activities and generating reports

Workflow 3: Managing Government Structure

Purpose: Maintain accurate geographic hierarchy for activity tracking

Steps:

1. Navigate to **Admin Panel → Gov. Structure**
2. View existing structure (Provinces → Districts → LLGs → Wards)
3. Click **"Add New"** at appropriate level
4. Enter location details
5. Assign parent location (for hierarchy)
6. Click **"Save"**
7. Verify location appears in hierarchy

Outcome: Updated government structure available for activity location selection

Workflow 4: Supervising and Approving Activities

Purpose: Review and approve submitted activities

Steps:

1. Navigate to **Supervised Activities**
2. Filter by status: **"Submitted"**

3. Click **"View"** on an activity
4. Review implementation details
5. Check supporting documents/images
6. Click **"Approve"** or **"Send Back for Revision"**
7. Add remarks (especially if sending back)
8. Click **"Submit"**

Outcome: Activity status changes to "Approved" or back to "Active" for revision

Workflow 5: Generating Comprehensive Reports

Purpose: Access system-wide reports for decision-making

Steps:

1. Navigate to **Reports → [Report Type]**
2. Set filters (date range, branch, status)
3. Click **"Apply Filters"** or **"Generate Report"**
4. Review report data (tables, charts, statistics)
5. Use search/sort functions to find specific data
6. Click **"Export PDF"** to download report
7. Save or print report for distribution

Outcome: Comprehensive report generated for analysis and sharing

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User Journey Diagram

Visual Representation of Administrator Journey

```
LOGIN
  ↓
DASHBOARD (Central Hub)
  ↓
  ├─→ ADMINISTRATION PATH
  │      ├─→ Manage Users → Create/Activate/Edit Users
  │      ├─→ Manage Master Data → Regions/Branches/Gov Structure
  │      └─→ Manage Strategic Plans → MTDP/NASP/Corporate Plans
  │
  ├─→ OPERATIONAL PATH
  │      ├─→ Create Workplans → Add Activities → Implement Activities
  │      ├─→ Supervise Activities → Review → Approve/Reject
  │      └─→ Evaluate Activities → Rate → Provide Feedback
  │
  ├─→ SME MANAGEMENT PATH
  │      ├─→ Register SMEs → Add SME Details → Upload Logo
  │      └─→ Manage SME Staff → Add Staff → Upload Photos
  │
```

```
│
├─→ REPORTING PATH
│     ├─→ Select Report Type → Apply Filters → View Report
│     └─→ Export Report → PDF/Excel → Share
│
└─→ MONITORING PATH
      ├─→ Statistics Dashboard → View Metrics → Analyze Trends
      └─→ Activity Maps → Geographic Analysis → Coverage Assessment
```

Common User Journeys

Journey 1: Daily Monitoring
Dashboard → Statistics → Supervised Activities → Approve Pending Items

Journey 2: User Management
Dashboard → Admin Panel → Users → Create/Activate Users

Journey 3: Strategic Planning
Dashboard → Admin Panel → MTDP/NASP/Corporate Plans → Manage Plans

Journey 4: Activity Implementation
Dashboard → My Activities → Create Activity → Implement → Submit

Journey 5: Reporting
Dashboard → Reports → Select Report → Filter → Export

Access Permissions Summary

As a System Administrator (`is_admin = 1`), you have **FULL ACCESS** to all features in AMIS.

What You CAN Access

- ✅ **All Menu Items:** Every menu and submenu in the system
- ✅ **All Features:** Every feature without restriction
- ✅ **All Data:** System-wide data across all branches and users
- ✅ **All Reports:** Every report type with full filtering capabilities
- ✅ **User Management:** Create, edit, activate, deactivate users
- ✅ **Master Data:** Manage all system configuration and master data
- ✅ **Strategic Plans:** Create and manage all plan types
- ✅ **SME Management:** Full SME and staff management
- ✅ **Activity Management:** Create, implement, supervise, evaluate all activities
- ✅ **Workplan Management:** Create and manage all workplans
- ✅ **Evaluation:** Rate and evaluate all activities
- ✅ **Supervision:** Approve/reject all activities
- ✅ **Statistics:** Access all analytics and dashboards

What You CANNOT Access

❌ **Dakoii Portal:** This is a separate super-admin portal (different login)

Permission Notes

- **Your admin capability** (`is_admin = 1`) grants you access to all features
- **You may also have** `is_supervisor` and `is_evaluator` capabilities
- **These additional capabilities** don't add permissions (you already have full access)
- **They may affect** which activities appear in "Supervised Activities" or "Evaluation" menus
- **Your base role** (usually "user") is less important than your admin capability

Data Visibility

- **System-wide visibility:** You can see all data regardless of branch
- **No filtering by branch:** Unless you apply filters yourself
- **Full edit permissions:** You can edit any record in the system
- **Deletion permissions:** You can delete records (soft delete - recoverable)

Part 2: Feature-by-Feature Documentation

Activity Management Features

Activity Management is the core of AMIS. As an administrator, you can create, implement, supervise, and manage all seven types of activities.

Feature: Activity Creation & Management

Feature Description:

The Activity Creation & Management feature allows you to create and manage agricultural activities across seven distinct types: Documents, Trainings, Meetings, Agreements, Inputs, Infrastructures, and Outputs. Each activity captures detailed information including title, description, location, dates, budget, and assignment of supervisors and action officers.

Purpose and Benefits:

- Centralized activity tracking across the organization
- Clear assignment of responsibility (supervisor and action officer)

- Budget allocation and cost monitoring
- Timeline establishment for progress tracking
- Linkage to strategic plans for results-based monitoring
- Geographic tracking for regional analysis

How to Access This Feature:

1. From Dashboard, click **"My Activities"** in the left sidebar
2. You'll see the Activities Index page with a list of all activities
3. Click **"New Activity"** button (top right) to create a new activity

Alternative Access:

- Dashboard → Supervised Activities → New Activity (if you're creating as a supervisor)

How to Use This Feature:

Creating a New Activity

Step 1: Click "New Activity" Button

- Located at the top right of the Activities Index page
- Opens the Activity Creation form

Step 2: Fill in Basic Information

Required Fields:

- **Activity Code:** Auto-generated or enter manually (unique identifier)
- **Activity Title:** Descriptive name of the activity
- **Activity Description:** Detailed explanation of what the activity entails
- **Activity Type:** Select from dropdown:
    - Documents
    - Trainings
    - Meetings
    - Agreements
    - Inputs
    - Infrastructures
    - Outputs

Location Fields:

- **Province:** Select from dropdown

- **District:** Select from dropdown (filtered by province)
- **LLG:** Select from dropdown (filtered by district) - Optional
- **Ward:** Select from dropdown (filtered by LLG) - Optional
- **Venue/Location:** Text description of specific location

Date Fields:

- **Start Date:** When the activity begins (date picker)
- **End Date:** When the activity ends (date picker)

Budget Fields:

- **Budget Allocated:** Total budget for this activity (numeric)
- **Cost Incurred:** Actual cost spent (numeric) - Can be updated later

Assignment Fields:

- **Supervisor:** Select user who will supervise this activity
- **Action Officer:** Select user responsible for implementing this activity

Strategic Plan Linkage (Optional):

- **MTDP Plan:** Link to Medium Term Development Plan elements
- **NASP Plan:** Link to National Agriculture Sector Plan elements
- **Corporate Plan:** Link to Corporate Plan elements

Step 3: Click "Create Activity"

- System validates all required fields
- Activity is created with status "Pending"
- You're redirected to the Activity Details page

Viewing Activities

From Activities Index:

1. Navigate to **My Activities**
2. Use filters to find specific activities:
    - Filter by Type (dropdown)
    - Filter by Status (dropdown)
    - Filter by Date Range (date pickers)
    - Search by keyword (search box)

3. Click **"View"** button on any activity to see details

Activity Details Page Shows:

- All activity information
- Implementation status
- Linked strategic plans
- Implementation details (if implemented)
- Approval history
- Rating information (if rated)

Editing Activities

1. From Activity Details page, click **"Edit"** button
2. Modify any fields (except Activity Code)
3. Click **"Update Activity"**
4. Changes are saved and logged

Note: Some fields may be locked if activity is already implemented or approved

Deleting Activities

1. From Activity Details page, click **"Delete"** button
2. Confirm deletion in popup dialog
3. Activity is soft-deleted (not permanently removed)
4. Can be recovered by administrators if needed

Note: Only activities with status "Pending" can be deleted

How This Feature Appears in Reports:

Activities appear in multiple reports:

1. **Workplan Reports**
    - Shows activities grouped by workplan
    - Displays activity type, status, budget, and cost
    - Filterable by date range and branch
2. **MTDP Reports**
    - Shows activities linked to MTDP strategies and KRAs
    - Aggregates activity counts and costs by MTDP element
    - Demonstrates contribution to national development goals
3. **NASP Reports**

- Shows activities linked to NASP objectives and strategies
- Sector-specific performance analysis
- Agricultural intervention tracking

4. **Corporate Plan Reports**
   - Shows activities linked to corporate objectives and KRAs
   - Organizational performance tracking
   - Strategic alignment analysis
5. **Activities Maps Report**
   - Geographic visualization of activity locations
   - Province/district/LLG level aggregation
   - Activity type distribution by location
6. **Statistics Dashboard**
   - Activity counts by type
   - Activity counts by status
   - Budget vs. cost analysis
   - Monthly trends
   - Top performers (supervisors and action officers)

Filtering in Reports:

- Use date range filters to see activities within specific periods
- Use branch filters to see activities by organizational unit
- Use status filters to see pending, active, submitted, approved, or rated activities
- Use type filters to see specific activity types

Additional Important Information:

Tips and Best Practices:

- **Use clear, descriptive titles** that explain what the activity is about
- **Fill in all location fields** for accurate geographic reporting
- **Link activities to strategic plans** to demonstrate contribution to goals
- **Assign appropriate supervisors** who can provide oversight
- **Set realistic dates** that allow for proper implementation
- **Update cost incurred** as expenses are made for accurate budget tracking

Common Mistakes to Avoid:

- Don't create duplicate activities - search first to see if it exists
- Don't leave supervisor or action officer unassigned
- Don't skip strategic plan linkage - it's crucial for reporting
- Don't use vague titles like "Activity 1" - be specific

- Don't forget to update end dates if activity timeline changes

Troubleshooting:

- **Can't save activity:** Check that all required fields are filled
- **Province/District dropdowns empty:** Contact admin to add government structure data
- **Can't find user in supervisor dropdown:** User may not have supervisor capability
- **Activity not appearing in reports:** Check if filters are excluding it

Related Features:

- **Activity Implementation:** After creating, you'll implement the activity based on its type
- **Workplan Management:** Activities are organized within workplans
- **Supervised Activities:** Supervisors review and approve activities here
- **Evaluation:** Evaluators rate activity quality and effectiveness

Permissions:

- **As Administrator:** You can create, view, edit, and delete ANY activity in the system
- **You can assign yourself** as supervisor or action officer
- **You can change** supervisor or action officer assignments
- **You can override** any activity settings

Email Notifications:

- **Supervisor receives email** when assigned to an activity
- **Action officer receives email** when assigned to an activity
- **Supervisor receives email** when activity is submitted for approval
- **Action officer receives email** when activity is approved or sent back

Data Validation:

- **Activity Code** must be unique
- **Start Date** cannot be after End Date
- **Budget and Cost** must be numeric values
- **Province** must be selected before District
- **District** must be selected before LLG
- **LLG** must be selected before Ward

Business Logic:

- **New activities** start with status "Pending"

- **Status changes** to "Active" when implementation begins
- **Status changes** to "Submitted" when action officer submits for review
- **Status changes** to "Approved" when supervisor approves
- **Status changes** to "Rated" when evaluator provides rating
- **Status can go back** to "Active" if supervisor sends back for revision

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Feature: Activity Implementation (7 Types)

Feature Description:

After creating an activity, you must implement it based on its type. Each of the seven activity types has a specialized implementation interface with specific fields and requirements. Implementation captures the actual work done, beneficiaries reached, costs incurred, and evidence of completion.

The Seven Activity Types:

1. **Documents** - Policy documents, reports, guidelines, publications
2. **Trainings** - Workshops, capacity building, educational programs
3. **Meetings** - Conferences, consultations, stakeholder engagements
4. **Agreements** - MOUs, contracts, partnerships, formal agreements
5. **Inputs** - Seeds, fertilizers, equipment, tools distribution
6. **Infrastructures** - Roads, buildings, irrigation systems, physical structures
7. **Outputs** - Deliverables, products, results, outcomes

Purpose and Benefits:

- Captures detailed implementation information specific to each activity type
- Documents beneficiaries reached and impact achieved
- Stores evidence (photos, documents, files) of implementation
- Tracks actual costs vs. budgeted amounts
- Provides data for evaluation and reporting
- Demonstrates results and accountability

How to Access This Feature:

1. Navigate to **My Activities**
2. Find an activity with status "Pending" or "Active"
3. Click **"View"** on the activity
4. Click **"Implement"** button on the Activity Details page
5. You'll be directed to the type-specific implementation form

Alternative Access:

- From Activity Details page → Click "Implement" button

How to Use This Feature:

Implementing a Document Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Document Implementation form

Step 2: Fill in Document Details

Required Fields:

- **Document Title:** Name of the document produced
- **Document Type:** Select type (policy, report, guideline, etc.)
- **Document Description:** What the document contains
- **Document Purpose:** Why the document was created
- **Number of Copies:** How many copies produced/distributed

File Upload:

- **Document File:** Upload the actual document (PDF, Word, Excel)
- Supported formats: PDF, DOC, DOCX, XLS, XLSX
- Maximum file size: 10MB

Distribution Information:

- **Distribution Method:** How document was distributed
- **Recipients:** Who received the document
- **Distribution Date:** When document was distributed

Step 3: Click "Save Implementation"

- System validates all required fields
- Implementation is saved
- Activity status changes to "Active" (implemented)

Implementing a Training Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Training Implementation form

Step 2: Fill in Training Details

Training Information:

- **Training Topic:** Main subject/theme of the training
- **Training Curriculum:** Detailed topics covered
- **Training Duration:** Number of days/hours
- **Training Venue:** Specific location where training was held
- **GPS Coordinates:** Location coordinates (optional)

Trainer Information:

- **Trainer Name:** Name of the trainer/facilitator
- **Trainer Organization:** Organization trainer represents
- **Trainer Qualifications:** Trainer's credentials/expertise

Participant Information (JSON Format):

- **Add Participants:** Click "Add Participant" button
- For each participant, enter:
  - Full Name
  - Gender (Male/Female)
  - Age
  - Village/Community
  - Contact Number (optional)
- **Total Participants:** Auto-calculated from participant list

File Uploads:

- **Training Images:** Upload photos from the training (multiple files)
  - Supported formats: JPG, PNG, JPEG
  - Maximum 5MB per image
  - Recommended: 3-10 photos showing training activities
- **Training Materials:** Upload training handouts, presentations (PDF, PPT)
- **Signing Sheet:** Upload attendance sheet with signatures (PDF, image)

Follow-up Information:

- **Follow-up Plan:** How participants will be supported after training
- **Expected Outcomes:** What participants should achieve

Step 3: Click "Save Implementation"

- System validates all required fields
- Participant data is stored as JSON
- Files are uploaded to server
- Activity status changes to "Active" (implemented)

Implementing a Meeting Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Meeting Implementation form

Step 2: Fill in Meeting Details

Meeting Information:

- **Meeting Date:** When the meeting was held
- **Meeting Time:** Start and end time
- **Meeting Type:** Select type (consultation, coordination, planning, etc.)
- **Meeting Venue:** Where the meeting was held
- **GPS Coordinates:** Location coordinates (optional)

Participant Information (JSON Format):

- **Add Participants:** Click "Add Participant" button
- For each participant, enter:
  - Full Name
  - Organization/Affiliation
  - Position/Title
  - Contact Information
- **Total Participants:** Auto-calculated

Agenda and Minutes (JSON Format):

- **Meeting Agenda:** Add agenda items
  - Item number

  - Agenda topic
  - Time allocated
- **Meeting Minutes:** Add minute items
  - Item number
  - Discussion summary
  - Decisions made
  - Action items
  - Responsible person

File Uploads:

- **Meeting Attachments:** Upload multiple files
  - Agenda documents
  - Presentations
  - Photos from meeting
  - Signed minutes
  - Supporting documents

Step 3: Click "Save Implementation"

- System validates all required fields
- Participant and minutes data stored as JSON
- Files uploaded to server
- Activity status changes to "Active" (implemented)

Implementing an Agreement Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Agreement Implementation form

Step 2: Fill in Agreement Details

Agreement Information:

- **Agreement Type:** Select type (MOU, Contract, Partnership, etc.)
- **Agreement Title:** Official name of the agreement
- **Agreement Description:** What the agreement covers
- **Agreement Terms:** Key terms and conditions

Parties Information:

- **Signing Parties:** List all parties to the agreement
    - Party name
    - Party type (Government, NGO, Private Sector, etc.)
    - Representative name
    - Representative title
- **Number of Parties:** Auto-calculated

Agreement Dates:

- **Signing Date:** When agreement was signed
- **Effective Date:** When agreement takes effect
- **Expiration Date:** When agreement expires (if applicable)

Agreement Value:

- **Estimated Value:** Financial value of the partnership/agreement
- **Currency:** PGK (Papua New Guinea Kina)

File Upload:

- **Agreement Document:** Upload signed agreement (PDF)
- **Supporting Documents:** Upload any annexes or supporting files

Step 3: Click "Save Implementation"

- System validates all required fields
- Agreement details saved
- Files uploaded
- Activity status changes to "Active" (implemented)

Implementing an Input Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Input Implementation form

Step 2: Fill in Input Distribution Details

Input Information:

- **Input Type:** Select type (Seeds, Fertilizer, Equipment, Tools, etc.)
- **Input Description:** Detailed description of the input

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- **Input Specifications:** Technical specifications, variety, brand, etc.
- **Quantity Distributed:** Total amount distributed
- **Unit of Measure:** Kg, bags, pieces, liters, etc.

Beneficiary Information (JSON Format):

- **Add Beneficiaries:** Click "Add Beneficiary" button
- For each beneficiary, enter:
  - Full Name
  - Gender
  - Village/Community
  - Input Received (type and quantity)
  - Contact Number (optional)
- **Total Beneficiaries:** Auto-calculated

Cost Information:

- **Unit Cost:** Cost per unit of input
- **Total Cost:** Auto-calculated (quantity × unit cost)
- **Cost per Beneficiary:** Auto-calculated (total cost ÷ beneficiaries)

Distribution Information:

- **Distribution Date:** When inputs were distributed
- **Distribution Location:** Where distribution took place
- **Distribution Method:** How inputs were distributed

File Uploads:

- **Distribution Photos:** Upload images of distribution event
- **Beneficiary List:** Upload signed beneficiary list (PDF, Excel)
- **Receipts/Invoices:** Upload purchase receipts

Step 3: Click "Save Implementation"

- System validates all required fields
- Beneficiary data stored as JSON
- Cost calculations performed
- Files uploaded
- Activity status changes to "Active" (implemented)

Implementing an Infrastructure Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Infrastructure Implementation form

Step 2: Fill in Infrastructure Details

Infrastructure Information:

- **Infrastructure Type:** Select type (Road, Building, Bridge, Irrigation, etc.)
- **Infrastructure Name:** Official name of the infrastructure
- **Infrastructure Description:** Detailed description of the project
- **Infrastructure Specifications:** Technical specifications
    - Dimensions (length, width, height)
    - Materials used
    - Capacity
    - Design standards

Location Information:

- **Specific Location:** Detailed location description
- **GPS Coordinates:** Latitude and longitude
- **Beneficiary Communities:** Villages/communities that benefit

Construction Information:

- **Contractor Name:** Company/individual who built it
- **Contractor Contact:** Contact information
- **Construction Start Date:** When construction began
- **Construction End Date:** When construction completed
- **Construction Duration:** Number of days/months

Cost Information:

- **Contract Value:** Total contract amount
- **Actual Cost:** Actual amount spent
- **Cost Breakdown:** Itemized costs (materials, labor, equipment)

Quality Information:

- **Quality Standards:** Standards followed

- **Quality Assurance:** Inspection and testing done
- **Warranty Period:** Warranty/maintenance period

File Uploads:

- **Construction Photos:** Before, during, and after photos
- **Technical Drawings:** Upload design plans (PDF)
- **Completion Certificate:** Upload certificate of completion
- **Inspection Reports:** Upload quality inspection reports

Step 3: Click "Save Implementation"

- System validates all required fields
- Infrastructure details saved
- Files uploaded
- Activity status changes to "Active" (implemented)

Implementing an Output Activity

Step 1: Access Implementation Form

- From Activity Details, click **"Implement"** button
- Opens Output Implementation form

Step 2: Fill in Output Details

Output Information:

- **Output Type:** Type of deliverable/result
- **Output Title:** Name of the output
- **Output Description:** What was produced/achieved
- **Output Specifications:** Detailed specifications

Target vs. Achievement:

- **Target Output:** What was planned to be achieved
- **Actual Output:** What was actually achieved
- **Achievement Percentage:** Auto-calculated (actual ÷ target × 100)

Quality Information:

- **Quality Indicators:** Measures of output quality
- **Quality Assessment:** How quality was verified

- **Quality Rating:** Self-assessment of quality

Linkage Information:

- **Linked to Workplan Activity:** Select parent workplan activity
- **Linked to Performance Output:** Select performance output indicator

File Uploads:

- **Output Evidence:** Upload proof of output (documents, photos)
- **Verification Documents:** Upload verification/certification documents

Step 3: Click "Save Implementation"

- System validates all required fields
- Achievement calculations performed
- Files uploaded
- Activity status changes to "Active" (implemented)

How This Feature Appears in Reports:

Implementation details appear in various reports:

1. **Workplan Reports**
   - Shows implementation status of activities
   - Displays beneficiary counts
   - Shows cost incurred vs. budget
2. **Statistics Dashboard**
   - Aggregates beneficiaries reached across all activities
   - Shows implementation rates by activity type
   - Displays cost analysis
3. **Activity Maps**
   - Shows implemented activities on map
   - Uses GPS coordinates from implementation
4. **Evaluation Reports**
   - Implementation details inform evaluation ratings
   - Evidence files support quality assessment

Additional Important Information:

Tips and Best Practices:

- **Upload high-quality photos** that clearly show the activity

- **Keep beneficiary lists accurate** - they're used for impact reporting
- **Save implementation data frequently** if form is long
- **Upload all supporting documents** for complete evidence
- **Fill in GPS coordinates** for accurate mapping
- **Be specific in descriptions** - avoid vague language
- **Update cost information** with actual expenses

Common Mistakes to Avoid:

- Don't skip file uploads - evidence is crucial
- Don't enter duplicate beneficiaries
- Don't use placeholder names in participant lists
- Don't forget to save before navigating away
- Don't upload files larger than size limits

Troubleshooting:

- **File upload fails:** Check file size and format
- **Can't add participants:** Check JSON format is valid
- **Form won't save:** Ensure all required fields are filled
- **Photos not displaying:** Check image format (JPG, PNG only)

Related Features:

- **Activity Creation:** Must create activity before implementing
- **Activity Submission:** After implementation, submit for supervisor approval
- **Activity Evaluation:** Evaluators review implementation details

Permissions:

- **As Administrator:** You can implement ANY activity
- **You can edit** implementation details after saving
- **You can re-implement** if changes are needed

Data Validation:

- **Dates** must be within activity start/end dates
- **Costs** must be numeric and positive
- **File formats** must match allowed types
- **Participant counts** must match list entries

Feature: Activity Status Workflow

Feature Description:

The Activity Status Workflow manages the lifecycle of activities from creation through completion and evaluation. Activities progress through five distinct statuses, each with specific permissions and actions.

The Five Status Levels:

1. **Pending** - Newly created, awaiting implementation
2. **Active** - Being implemented or revised
3. **Submitted** - Submitted for supervisor review
4. **Approved** - Approved by supervisor
5. **Rated** - Evaluated by evaluator

Purpose and Benefits:

- Clear tracking of activity progress
- Quality control through supervisor approval
- Accountability at each stage
- Audit trail of status changes
- Performance measurement through evaluation

How to Access This Feature:

Status workflow is integrated into activity management:

1. **View current status:** Activity Details page shows current status
2. **Change status:** Available actions depend on your role and current status
3. **View status history:** Activity Details page shows status change log

How to Use This Feature:

Understanding Status Transitions

From Pending to Active:

- **Who can do it:** Action Officer or Administrator
- **How:** Click "Implement" button and save implementation
- **When:** After activity is created and ready for implementation
- **Result:** Activity moves to "Active" status

From Active to Submitted:

- **Who can do it:** Action Officer or Administrator
- **How:** Click "Submit for Review" button on Activity Details page
- **When:** After implementation is complete and ready for supervisor review
- **Result:** Activity moves to "Submitted" status
- **Notification:** Supervisor receives email notification

From Submitted to Approved:

- **Who can do it:** Supervisor or Administrator
- **How:** Navigate to Supervised Activities → View activity → Click "Approve"
- **When:** After reviewing implementation and confirming quality
- **Result:** Activity moves to "Approved" status
- **Notification:** Action Officer receives email notification

From Submitted back to Active:

- **Who can do it:** Supervisor or Administrator
- **How:** Navigate to Supervised Activities → View activity → Click "Send Back for Revision"
- **When:** If implementation needs improvement or corrections
- **Result:** Activity moves back to "Active" status for revision
- **Notification:** Action Officer receives email with supervisor's remarks

From Approved to Rated:

- **Who can do it:** Evaluator or Administrator
- **How:** Navigate to Evaluation → View activity → Rate activity
- **When:** During evaluation period
- **Result:** Activity moves to "Rated" status with rating percentage
- **Notification:** Action Officer and Supervisor receive notification

Viewing Status History

1. Navigate to Activity Details page
2. Scroll to "Status History" section
3. View chronological list of status changes:
    - Date and time of change
    - Previous status
    - New status
    - User who made the change
    - Remarks (if any)

Filtering Activities by Status

In My Activities:

1. Navigate to **My Activities**
2. Use **Status Filter** dropdown
3. Select desired status (Pending, Active, Submitted, Approved, Rated)
4. Click **Apply Filter**
5. View filtered list

In Supervised Activities:

1. Navigate to **Supervised Activities**
2. Use **Status Filter** dropdown
3. Select "Submitted" to see activities awaiting your approval
4. Select "Approved" to see activities you've approved
5. Click **Apply Filter**

How This Feature Appears in Reports:

Status information appears in all reports:

1. **Workplan Reports**
   - Shows status distribution (pie chart)
   - Lists activities by status
   - Calculates completion rates based on approved/rated activities
2. **Statistics Dashboard**
   - Status breakdown cards showing counts for each status
   - Trend analysis of status changes over time
3. **Activity Reports**
   - Status column in activity tables
   - Status-based filtering options

Additional Important Information:

Tips and Best Practices:

- **Submit activities promptly** after implementation for timely approval
- **Provide clear remarks** when sending back for revision
- **Review implementation thoroughly** before approving
- **Track pending submissions** regularly to avoid delays
- **Use status filters** to focus on activities needing action

Common Mistakes to Avoid:

- Don't approve activities without reviewing implementation details
- Don't submit incomplete implementations
- Don't skip adding remarks when sending back for revision
- Don't let submitted activities sit too long without review

Troubleshooting:

- **Can't submit activity:** Ensure implementation is complete
- **Can't approve activity:** Check you're assigned as supervisor
- **Status not changing:** Refresh page or check permissions
- **Missing status history:** May indicate data issue - contact support

Related Features:

- **Activity Implementation:** Must be implemented before submission
- **Supervised Activities:** Where supervisors approve/reject
- **Evaluation:** Final status after rating

Permissions:

- **As Administrator:** You can change any activity to any status
- **You can override** status restrictions if needed
- **You can approve** activities even if not assigned as supervisor

Email Notifications:

- **On submission:** Supervisor receives email
- **On approval:** Action Officer receives email
- **On send back:** Action Officer receives email with remarks
- **On rating:** Action Officer and Supervisor receive email

Business Logic:

- **Delete button** only appears for "Pending" activities
- **Implement button** only appears for "Pending" or "Active" activities
- **Submit button** only appears for "Active" activities
- **Approve/Send Back buttons** only appear for "Submitted" activities
- **Rate button** only appears for "Approved" activities

Workplan Management Features

Workplans organize related activities into coordinated work programs with defined timeframes and budgets.

Feature: Workplan Creation & Management

Feature Description:

Workplans are containers that group related activities for coordinated implementation. Each workplan has a title, description, start/end dates, budget allocation, and assigned supervisor. Workplans provide the framework for organizing activities, monitoring progress, and reporting results.

Purpose and Benefits:

- Organizes activities into logical work programs
- Establishes timeframes for coordinated implementation
- Sets budget parameters for cost control
- Assigns supervisory responsibility
- Provides framework for progress reporting
- Enables workplan-level performance assessment
- Supports resource planning and allocation
- Facilitates team coordination

How to Access This Feature:

1. From Dashboard, click **"Workplans"** in the left sidebar
2. You'll see the Workplans Index page with a list of all workplans
3. Click **"New Workplan"** button (top right) to create a new workplan

How to Use This Feature:

Creating a New Workplan

Step 1: Click "New Workplan" Button

- Located at the top right of the Workplans Index page
- Opens the Workplan Creation form

Step 2: Fill in Workplan Information

Required Fields:

- **Workplan Code:** Auto-generated or enter manually (unique identifier)

- **Workplan Title:** Descriptive name of the workplan
- **Workplan Description:** Detailed explanation of the work program
- **Start Date:** When the workplan begins (date picker)
- **End Date:** When the workplan ends (date picker)
- **Budget Allocated:** Total budget for this workplan (numeric)
- **Supervisor:** Select user who will supervise this workplan
- **Branch:** Select organizational branch (auto-filled from your profile)

Optional Fields:

- **Status:** Select initial status (Draft, In Progress, Completed, On Hold)
    - Default: Draft
- **Remarks:** Additional notes or comments

Step 3: Click "Create Workplan"

- System validates all required fields
- Workplan is created
- Email notification sent to assigned supervisor
- You're redirected to the Workplan Details page

Viewing Workplans

From Workplans Index:

1. Navigate to **Workplans**
2. Use filters to find specific workplans:
    - Filter by Status (dropdown)
    - Filter by Date Range (date pickers)
    - Filter by Branch (dropdown)
    - Search by keyword (search box)
3. Click **"View"** button on any workplan to see details

Workplan Details Page Shows:

- Workplan information (title, dates, budget, supervisor)
- Current status
- List of activities within the workplan
- Activity count by type
- Budget vs. cost analysis
- Completion percentage

- Timeline visualization

Adding Activities to Workplans

Method 1: From Workplan Details Page

1. Navigate to Workplan Details
2. Click **"Add Activity"** button
3. Fill in activity creation form
4. Workplan is automatically linked
5. Click **"Create Activity"**

Method 2: From Activity Creation

1. Navigate to **My Activities → New Activity**
2. Fill in activity details
3. In **"Workplan"** dropdown, select the workplan
4. Click **"Create Activity"**
5. Activity is added to the selected workplan

Editing Workplans

1. From Workplan Details page, click **"Edit"** button
2. Modify any fields
3. Click **"Update Workplan"**
4. Changes are saved and logged

Editable Fields:

- Workplan title and description
- Start and end dates
- Budget allocated
- Supervisor assignment
- Status
- Remarks

Managing Workplan Status

Four Status Levels:

1. **Draft** - Planning stage, not yet started
2. **In Progress** - Active implementation

3. **Completed** - All activities finished
4. **On Hold** - Temporarily paused

Changing Status:

1. From Workplan Details page, click **"Change Status"** button
2. Select new status from dropdown
3. Add remarks explaining the status change
4. Click **"Update Status"**
5. Status is updated and logged

Deleting Workplans

1. From Workplan Details page, click **"Delete"** button
2. Confirm deletion in popup dialog
3. Workplan is soft-deleted (not permanently removed)
4. Associated activities are NOT deleted (they remain but unlinked)

Note: Only workplans with status "Draft" and no activities can be deleted

How This Feature Appears in Reports:

Workplans appear in multiple reports:

1. **Workplan Reports**
   - Complete list of all workplans
   - Workplan details with activity breakdown
   - Budget vs. cost analysis by workplan
   - Timeline visualization
   - Completion percentage
   - Status distribution
   - Branch comparison
2. **Statistics Dashboard**
   - Total workplans count
   - Workplans by status
   - Workplans by branch
   - Average activities per workplan
3. **Activity Reports**
   - Activities grouped by workplan
   - Workplan name shown for each activity

Filtering in Reports:

- Use date range filters to see workplans within specific periods
- Use branch filters to see workplans by organizational unit
- Use status filters to see draft, in progress, completed, or on hold workplans
- Use supervisor filters to see workplans by supervisor

Additional Important Information:

Tips and Best Practices:

- **Use clear, descriptive titles** that explain the work program
- **Set realistic timeframes** that allow for proper implementation
- **Assign appropriate supervisors** who can provide oversight
- **Group related activities** in the same workplan for coordination
- **Update status regularly** to reflect current progress
- **Monitor budget vs. cost** to avoid overspending
- **Review workplan progress** weekly or monthly

Common Mistakes to Avoid:

- Don't create too many small workplans - group related work
- Don't set unrealistic end dates
- Don't forget to update status as work progresses
- Don't assign supervisors who are overloaded
- Don't skip budget allocation - it's needed for cost tracking

Troubleshooting:

- **Can't save workplan:** Check that all required fields are filled
- **Supervisor dropdown empty:** User may not have supervisor capability
- **Can't delete workplan:** Check if it has activities or status is not "Draft"
- **Email not sent to supervisor:** Check supervisor's email address in their profile

Related Features:

- **Activity Management:** Activities are added to workplans
- **Supervised Activities:** Supervisors monitor workplan activities
- **Workplan Reports:** Comprehensive workplan reporting

Permissions:

- **As Administrator:** You can create, view, edit, and delete ANY workplan
- **You can assign yourself** as supervisor

- **You can change** supervisor assignments
- **You can override** any workplan settings

Email Notifications:

- **Supervisor receives email** when assigned to a workplan
- **Supervisor receives email** when workplan status changes
- **Supervisor receives email** when activities are added to their workplan

Data Validation:

- **Workplan Code** must be unique
- **Start Date** cannot be after End Date
- **Budget** must be numeric and positive
- **Supervisor** must have supervisor capability
- **Branch** must be valid

Business Logic:

- **New workplans** default to "Draft" status
- **Budget vs. Cost** is calculated from all activities in the workplan
- **Completion percentage** is based on approved/rated activities
- **Activity count** includes all activities regardless of status
- **Email notifications** are sent asynchronously

User Management Features

As an administrator, you have full control over user accounts, roles, and permissions.

Feature: User Creation & Activation

Feature Description:

The User Creation & Activation feature allows you to create new user accounts, assign roles and capabilities, and activate users so they can access the system. This is a two-step process: creation and activation.

Purpose and Benefits:

- Controls who can access the system
- Assigns appropriate roles and permissions
- Ensures user accountability through proper registration

- Maintains security through activation workflow
- Tracks user information for reporting and communication

How to Access This Feature:

1. From Dashboard, click **"Admin Panel"** in the left sidebar
2. Click **"Users"** from the Admin Panel submenu
3. You'll see the Users Index page with a list of all users
4. Click **"New User"** button (top right) to create a new user

How to Use This Feature:

Creating a New User

Step 1: Click "New User" Button

- Located at the top right of the Users Index page
- Opens the User Creation form

Step 2: Fill in User Information

Personal Information (Required):

- **First Name:** User's first name
- **Last Name:** User's last name
- **Email Address:** User's email (must be unique)
- **Gender:** Select Male or Female
- **Date of Birth:** User's birth date (date picker)

Contact Information:

- **Phone Number:** User's contact number
- **Address:** Physical address (optional)

Employment Information (Required):

- **Branch:** Select organizational branch
- **Designation:** User's job title/position
- **Employee Number:** Staff ID number (optional)

Account Information (Required):

- **Role:** Select from dropdown:

  - **user** - Regular user (default)
  - **guest** - Limited read-only access
- **Password:** Initial password (user should change on first login)
- **Confirm Password:** Re-enter password

Capabilities (Checkboxes):

- ☐ **Administrator (is_admin):** Full system access
- ☐ **Supervisor (is_supervisor):** Can supervise workplans and activities
- ☐ **Evaluator (is_evaluator):** Can evaluate and rate activities

Important: Guest users cannot have any capabilities (all checkboxes disabled)

Profile Photo (Optional):

- **ID Photo:** Upload user's photo
  - Supported formats: JPG, PNG, JPEG
  - Maximum file size: 2MB
  - Recommended: Passport-style photo

Step 3: Click "Create User"

- System validates all required fields
- User account is created with status "Pending"
- System sends activation email to user's email address
- You're redirected to the Users Index page
- Success message confirms user creation

Activating a User

Step 1: User Receives Activation Email

- Email contains activation link
- User clicks link to verify email address
- User's account status changes to "Awaiting Activation"

Step 2: Administrator Activates User

1. Navigate to **Admin Panel → Users**
2. Find user with status "Awaiting Activation"
3. Click **"Activate"** button next to user's name
4. Confirm activation in popup dialog

5. User's account status changes to "Active"
6. User can now log in to the system

Alternative: You can activate users immediately without waiting for email verification:

1. Find user with status "Pending"
2. Click **"Activate"** button
3. User's status changes to "Active"
4. User can log in (email verification bypassed)

Viewing Users

From Users Index:

1. Navigate to **Admin Panel → Users**
2. View complete list of all users
3. Use filters to find specific users:
   - Filter by Status (Active, Inactive, Pending)
   - Filter by Branch
   - Filter by Role
   - Filter by Capabilities (Admin, Supervisor, Evaluator)
   - Search by name or email
4. Click **"View"** button to see user details

User Details Page Shows:

- Personal information
- Contact information
- Employment information
- Account status
- Assigned capabilities
- Activity statistics (activities created, supervised, evaluated)
- Login history (if tracked)

Editing Users

1. From Users Index, click **"Edit"** button next to user's name
2. Modify any fields (except email address)
3. Update capabilities as needed
4. Click **"Update User"**
5. Changes are saved and logged

Editable Fields:

- Personal information (name, gender, DOB)
- Contact information
- Employment information (branch, designation)
- Role
- Capabilities (Admin, Supervisor, Evaluator)
- Password (if resetting)
- Profile photo

Non-Editable Fields:

- Email address (unique identifier)
- User code (auto-generated)

Deactivating Users

1. From Users Index, click **"Deactivate"** button next to user's name
2. Add remarks explaining deactivation
3. Confirm deactivation
4. User's status changes to "Inactive"
5. User can no longer log in
6. User's data is preserved (not deleted)

Reactivating Users:

1. Find inactive user
2. Click **"Activate"** button
3. User's status changes to "Active"
4. User can log in again

Deleting Users

1. From User Details page, click **"Delete"** button
2. Confirm deletion in popup dialog
3. User is soft-deleted (not permanently removed)
4. User's activities and data are preserved
5. User cannot log in

Note: Deletion is rarely needed - deactivation is preferred

How This Feature Appears in Reports:

User information appears in various reports:

1. **HR Reports**
   - User count by branch
   - User count by role
   - User count by capabilities
   - User status distribution
   - User demographics (gender, age)
   - User activity metrics
2. **Activity Reports**
   - Shows supervisor and action officer names
   - Links to user profiles
3. **Workplan Reports**
   - Shows supervisor names
   - Links to user profiles

Additional Important Information:

Tips and Best Practices:

- **Verify email addresses** before creating users
- **Assign capabilities carefully** - they grant significant permissions
- **Use strong initial passwords** and instruct users to change them
- **Activate users promptly** after email verification
- **Review user list regularly** to identify inactive accounts
- **Deactivate users** who leave the organization
- **Don't delete users** unless absolutely necessary (deactivate instead)
- **Upload profile photos** for better user identification

Common Mistakes to Avoid:

- Don't create duplicate users - search first
- Don't assign admin capability to everyone
- Don't use weak passwords
- Don't forget to assign branch
- Don't skip email verification for security
- Don't assign guest role with capabilities (system prevents this)

Troubleshooting:

- **Email not sent:** Check email configuration in system settings
- **Can't activate user:** Check user has verified email

- **User can't log in:** Check user status is "Active"
- **Capabilities not working:** User may need to log out and log in again
- **Profile photo not uploading:** Check file size and format

Related Features:

- **Role-Based Access Control:** Capabilities determine menu visibility
- **Activity Management:** Users create and manage activities
- **Workplan Management:** Users create and supervise workplans

Permissions:

- **As Administrator:** You can create, edit, activate, deactivate, and delete ANY user
- **You can assign** any role and any capabilities
- **You can reset** user passwords
- **You cannot** edit your own admin capability (prevents lockout)

Email Notifications:

- **On user creation:** User receives activation email
- **On activation:** User receives welcome email
- **On password reset:** User receives password reset email
- **On deactivation:** User receives notification email

Data Validation:

- **Email address** must be unique and valid format
- **Password** must meet minimum requirements (8 characters)
- **Date of Birth** must be in the past
- **Branch** must be valid
- **Guest role** cannot have capabilities
- **Profile photo** must be image format and under size limit

Business Logic:

- **User code** is auto-generated on creation
- **Default role** is "user"
- **Default status** is "Pending"
- **Guest users** have all capabilities forced to 0
- **Email verification** is optional but recommended
- **Activation** can be done before or after email verification

Administration Features

Administration features provide system-wide configuration and master data management.

Feature: Government Structure Management

Feature Description:

Government Structure Management allows you to create and maintain the hierarchical geographic structure of Papua New Guinea: Provinces → Districts → LLGs (Local Level Governments) → Wards. This structure is used throughout the system for activity location tracking and geographic reporting.

Purpose and Benefits:

- Provides standardized location data for activities
- Enables geographic distribution analysis
- Supports regional performance comparison
- Facilitates location-based reporting
- Enables mapping and visualization
- Supports decentralized planning

How to Access This Feature:

1. From Dashboard, click **"Admin Panel"** in the left sidebar
2. Click **"Gov. Structure"** from the Admin Panel submenu
3. You'll see the Government Structure page with hierarchical view

How to Use This Feature:

Viewing Government Structure

Hierarchical View:

- **Provinces** (Level 1) - Top level
    - **Districts** (Level 2) - Under provinces
        - **LLGs** (Level 3) - Under districts
            - **Wards** (Level 4) - Under LLGs

Navigation:

1. View list of all provinces

2. Click **"View Districts"** to see districts in a province
3. Click **"View LLGs"** to see LLGs in a district
4. Click **"View Wards"** to see wards in an LLG

Adding a Province

Step 1: Click "Add Province" Button

- Located at the top of the Government Structure page

Step 2: Fill in Province Information

- **Province Name:** Official name of the province
- **Province Code:** Short code (e.g., "NCD", "WHP")
- **Description:** Additional information (optional)

Step 3: Click "Save"

- Province is added to the system
- Available for selection in activity location fields

Adding a District

Step 1: Navigate to Province

- Click **"View Districts"** on a province

Step 2: Click "Add District" Button

Step 3: Fill in District Information

- **District Name:** Official name of the district
- **District Code:** Short code
- **Province:** Auto-filled (parent province)
- **Description:** Additional information (optional)

Step 4: Click "Save"

- District is added under the selected province

Adding an LLG

Step 1: Navigate to District

- Click **"View LLGs"** on a district

Step 2: Click "Add LLG" Button

Step 3: Fill in LLG Information

- **LLG Name:** Official name of the LLG
- **LLG Code:** Short code
- **District:** Auto-filled (parent district)
- **Description:** Additional information (optional)

Step 4: Click "Save"

- LLG is added under the selected district

Adding a Ward

Step 1: Navigate to LLG

- Click **"View Wards"** on an LLG

Step 2: Click "Add Ward" Button

Step 3: Fill in Ward Information

- **Ward Name:** Official name or number of the ward
- **Ward Code:** Short code
- **LLG:** Auto-filled (parent LLG)
- **Description:** Additional information (optional)

Step 4: Click "Save"

- Ward is added under the selected LLG

Editing Government Structure

1. Navigate to the level you want to edit
2. Click **"Edit"** button next to the item
3. Modify information
4. Click **"Update"**
5. Changes are saved

Deleting Government Structure Items

1. Navigate to the item you want to delete
2. Click **"Delete"** button
3. Confirm deletion
4. Item is soft-deleted

Note: Cannot delete items that have child items or are linked to activities

How This Feature Appears in Reports:

Government structure appears in:

1. **Government Structure Reports**
   - Complete hierarchy visualization
   - Activity count by province/district/LLG/ward
   - Budget and cost analysis by location
   - Coverage analysis
2. **Activity Maps**
   - Geographic visualization using structure
   - Activity markers by location
   - Location-based filtering
3. **All Activity Reports**
   - Location columns show province, district, LLG, ward
   - Location-based filtering options

Additional Important Information:

Tips and Best Practices:

- **Use official names** from government sources
- **Keep codes consistent** and standardized
- **Add all levels** for complete hierarchy
- **Verify spelling** to avoid duplicates
- **Update regularly** when administrative boundaries change

Common Mistakes to Avoid:

- Don't create duplicate locations with different spellings
- Don't skip levels in the hierarchy
- Don't use abbreviations in names (use codes for that)
- Don't delete locations that have activities

Troubleshooting:

- **Can't add district:** Ensure province exists first
- **Can't delete province:** Check if it has districts or activities
- **Location not appearing in dropdowns:** Check hierarchy is correct

Related Features:

- **Activity Creation:** Uses government structure for location selection
- **Activity Maps:** Visualizes activities by location
- **Reports:** Filter and group by location

Feature: Strategic Plan Management (MTDP, NASP, Corporate Plans)

Feature Description:

Strategic Plan Management allows you to create and maintain three types of strategic plans: MTDP (Medium Term Development Plan), NASP (National Agriculture Sector Plan), and Corporate Plans. These plans provide the framework for linking activities to strategic objectives and measuring results.

The Three Plan Types:

1. **MTDP Plans** - National development plans with strategies, KRAs, and indicators
2. **NASP Plans** - Agricultural sector plans with objectives and strategies
3. **Corporate Plans** - Organizational plans with objectives, KRAs, and strategies

Purpose and Benefits:

- Links activities to strategic objectives
- Enables results-based monitoring
- Supports strategic reporting
- Measures progress toward targets
- Demonstrates contribution to goals
- Facilitates impact assessment

How to Access This Feature:

For MTDP Plans:

1. Dashboard → Admin Panel → MTDP Plans

For NASP Plans:

1. Dashboard → Admin Panel → NASP Plans

For Corporate Plans:

1. Dashboard → Admin Panel → Corporate Plans

How to Use This Feature:

Creating an MTDP Plan

Step 1: Navigate to MTDP Plans

- Admin Panel → MTDP Plans

Step 2: Click "New MTDP Plan" Button

Step 3: Fill in Plan Information

- **Plan Name:** e.g., "MTDP 2023-2027"
- **Plan Description:** Overview of the plan
- **Start Year:** 2023
- **End Year:** 2027
- **Status:** Active/Inactive

Step 4: Click "Create Plan"

- Plan is created
- Ready for adding hierarchy

Step 5: Add Plan Hierarchy

The MTDP hierarchy is:

- **Plan** (top level)
  - **Strategies** (strategic priorities)
    - **KRAs** (Key Result Areas)
      - **Indicators** (performance indicators)
        - **Investments** (specific investments)

Adding a Strategy:

1. From MTDP Plan Details, click "Add Strategy"
2. Enter strategy name and description
3. Click "Save"

Adding a KRA:

1. From Strategy Details, click "Add KRA"
2. Enter KRA name and description
3. Click "Save"

Adding an Indicator:

1. From KRA Details, click "Add Indicator"
2. Enter indicator name, baseline, target
3. Click "Save"

Adding an Investment:

1. From Indicator Details, click "Add Investment"
2. Enter investment details
3. Click "Save"

Creating a NASP Plan

Step 1: Navigate to NASP Plans

- Admin Panel → NASP Plans

Step 2: Click "New NASP Plan" Button

Step 3: Fill in Plan Information

- **Plan Name:** e.g., "NASP 2023-2030"
- **Plan Description:** Overview of the plan
- **Start Year:** 2023
- **End Year:** 2030
- **Status:** Active/Inactive

Step 4: Click "Create Plan"

Step 5: Add Plan Hierarchy

The NASP hierarchy is:

- **Plan** (top level)
    - **Objectives** (strategic objectives)
        - **Strategies** (implementation strategies)

Adding an Objective:

1. From NASP Plan Details, click "Add Objective"
2. Enter objective name and description
3. Click "Save"

Adding a Strategy:

1. From Objective Details, click "Add Strategy"
2. Enter strategy name and description
3. Click "Save"

Creating a Corporate Plan

Step 1: Navigate to Corporate Plans

- Admin Panel → Corporate Plans

Step 2: Click "New Corporate Plan" Button

Step 3: Fill in Plan Information

- **Plan Name:** e.g., "Corporate Plan 2023-2027"
- **Plan Description:** Overview of the plan
- **Start Year:** 2023
- **End Year:** 2027
- **Status:** Active/Inactive

Step 4: Click "Create Plan"

Step 5: Add Plan Hierarchy

The Corporate Plan hierarchy is:

- **Plan** (top level)
  - **Objectives** (organizational objectives)
    - **KRAs** (Key Result Areas)
      - **Strategies** (implementation strategies)

Adding an Objective:

1. From Corporate Plan Details, click "Add Objective"
2. Enter objective name and description

3. Click "Save"

Adding a KRA:

1. From Objective Details, click "Add KRA"
2. Enter KRA name and description
3. Click "Save"

Adding a Strategy:

1. From KRA Details, click "Add Strategy"
2. Enter strategy name and description
3. Click "Save"

Linking Activities to Strategic Plans

During Activity Creation:

1. Create or edit an activity
2. Scroll to "Strategic Plan Linkage" section
3. Select MTDP element (Strategy, KRA, Indicator)
4. Select NASP element (Objective, Strategy)
5. Select Corporate Plan element (Objective, KRA, Strategy)
6. Save activity

Result: Activity is linked to selected plan elements and appears in strategic plan reports

How This Feature Appears in Reports:

Strategic plans appear in dedicated reports:

1. **MTDP Reports**
   - Complete MTDP hierarchy
   - Activities linked to each element
   - Activity counts and costs by element
   - Mind map visualization
   - Progress toward indicators
2. **NASP Reports**
   - Complete NASP hierarchy
   - Activities linked to each element
   - Sector performance analysis
   - Objective achievement tracking
3. **Corporate Plan Reports**

   - Complete corporate plan hierarchy
   - Activities linked to each element
   - Organizational performance tracking
   - KRA achievement analysis

Additional Important Information:

Tips and Best Practices:

- **Use official plan documents** as reference
- **Maintain consistent naming** with official plans
- **Add complete hierarchy** before linking activities
- **Set realistic targets** for indicators
- **Update plans** when official plans are revised
- **Deactivate old plans** when new ones are adopted

Common Mistakes to Avoid:

- Don't create duplicate plan elements
- Don't skip levels in the hierarchy
- Don't link activities to inactive plans
- Don't delete plan elements that have linked activities

Troubleshooting:

- **Can't add KRA:** Ensure parent strategy/objective exists
- **Plan not appearing in activity form:** Check plan status is "Active"
- **Can't delete plan element:** Check if activities are linked to it

Related Features:

- **Activity Creation:** Link activities to plans
- **Strategic Plan Reports:** View plan implementation
- **Results-Based Monitoring:** Track contribution to targets

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Reporting Features

AMIS provides comprehensive reporting across all modules. As an administrator, you have access to all reports with full filtering capabilities.

Feature: Workplan Reports

Feature Description:

Workplan Reports provide comprehensive analysis of workplan implementation, including workplan details, activities, budget vs. cost analysis, completion status, and performance metrics.

Purpose and Benefits:

- Monitors workplan implementation progress
- Tracks budget adherence
- Shows activity completion rates
- Identifies delayed or stalled workplans
- Supports resource allocation decisions
- Facilitates supervisor oversight
- Enables team performance assessment

How to Access This Feature:

1. From Dashboard, click **"Reports"** in the left sidebar
2. Click **"Workplan Report"** from the Reports submenu
3. You'll see the Workplan Report page

How to Use This Feature:

Viewing Workplan Reports

Step 1: Access Workplan Report

- Navigate to Reports → Workplan Report

Step 2: Apply Filters (Optional)

Available Filters:

- **Date Range:** Filter by workplan start/end dates
  - From Date (date picker)
  - To Date (date picker)
- **Branch:** Filter by organizational branch (dropdown)
- **Status:** Filter by workplan status (dropdown)
  - Draft
  - In Progress
  - Completed

  - On Hold
- **Supervisor:** Filter by supervisor (dropdown)

Step 3: Click "Apply Filters" or "Generate Report"

- Report refreshes with filtered data

Step 4: Review Report Sections

Section 1: Summary Statistics

- Total Workplans
- Total Activities
- Total Budget Allocated
- Total Cost Incurred
- Budget Utilization Percentage
- Completion Rate

Section 2: Workplans Table

- Workplan Code
- Workplan Title
- Supervisor
- Branch
- Start Date
- End Date
- Status
- Activity Count
- Budget
- Cost
- Completion %
- Actions (View Details)

Section 3: Activities Table

- Activity Code
- Activity Title
- Workplan
- Type
- Status
- Budget

- Cost
- Supervisor
- Action Officer
- Actions (View Details)

Section 4: Charts and Visualizations

- Workplan Status Distribution (Pie Chart)
- Activity Type Distribution (Bar Chart)
- Budget vs. Cost Analysis (Bar Chart)
- Monthly Trends (Line Chart)

Using Report Features

Searching:

- Use search box above tables
- Search by workplan title, code, supervisor name
- Results filter in real-time

Sorting:

- Click column headers to sort
- Click again to reverse sort order
- Multi-column sorting available

Pagination:

- Navigate through pages if many records
- Change records per page (10, 25, 50, 100)

Exporting:

- Click **"Export PDF"** button to download report as PDF
- PDF includes all filtered data and charts
- Formatted for printing and sharing

Interpreting Report Data

Completion Percentage:

- Calculated as: (Approved + Rated Activities) ÷ Total Activities × 100

- Shows how much of the workplan is complete

Budget Utilization:

- Calculated as: Cost Incurred ÷ Budget Allocated × 100
- Shows spending efficiency
- 100% indicates overspending
- <100% indicates underspending

Status Distribution:

- Shows how many workplans are in each status
- Helps identify bottlenecks

How This Feature Appears in Reports:

Workplan data feeds into other reports:

1. **Statistics Dashboard**
   - Workplan counts and metrics
   - Workplan trends over time
2. **Branch Reports**
   - Workplans by branch
   - Branch performance comparison
3. **Supervisor Reports**
   - Workplans by supervisor
   - Supervisor performance metrics

Additional Important Information:

Tips and Best Practices:

- **Apply date filters** to focus on specific periods
- **Export reports regularly** for record-keeping
- **Review completion rates** to identify delays
- **Monitor budget utilization** to prevent overspending
- **Use search function** to find specific workplans quickly
- **Compare branches** to identify best practices

Common Mistakes to Avoid:

- Don't forget to apply filters before exporting
- Don't misinterpret completion % (it's based on approved activities, not all activities)

- Don't ignore workplans with low completion rates
- Don't export without reviewing data first

Troubleshooting:

- **No data showing:** Check filters aren't too restrictive
- **Export fails:** Check browser pop-up blocker
- **Charts not displaying:** Refresh page or check browser compatibility
- **Slow loading:** Reduce date range or apply more filters

Related Features:

- **Workplan Management:** Create and manage workplans
- **Activity Management:** Activities within workplans
- **Statistics Dashboard:** Real-time workplan metrics

Permissions:

- **As Administrator:** You see ALL workplans regardless of branch
- **You can export** all data
- **You can view** detailed information for any workplan

Feature: Statistics Dashboard

Feature Description:

The Statistics Dashboard provides real-time analytics and visualizations of system-wide data. It includes summary cards, interactive charts, and performance metrics using Chart.js for data visualization.

Purpose and Benefits:

- Provides instant visibility of key metrics
- Tracks activity implementation trends
- Measures budget utilization
- Shows activity type distribution
- Identifies top performers
- Supports data-driven decision making
- Facilitates rapid response to issues
- Enables performance benchmarking

How to Access This Feature:

1. From Dashboard, click **"Reports"** in the left sidebar
2. Click **"Statistics"** from the Reports submenu
3. You'll see the Statistics Dashboard

How to Use This Feature:

Viewing Statistics Dashboard

Step 1: Access Statistics Dashboard

- Navigate to Reports → Statistics

Step 2: Apply Filters (Optional)

Available Filters:

- **Date Range:** Filter by activity dates
  - From Date (date picker)
  - To Date (date picker)
- **Branch:** Filter by organizational branch (dropdown)

Step 3: Click "Apply Filters"

- Dashboard refreshes with filtered data

Step 4: Review Dashboard Sections

Section 1: Summary Cards

Workplan Metrics:

- **Total Workplans:** Count of all workplans

Activity Metrics:

- **Total Activities:** Count of all activities
- **Meetings:** Count and cost
- **Trainings:** Count and cost
- **Documents:** Count and cost
- **Agreements:** Count and cost
- **Inputs:** Count and cost
- **Infrastructures:** Count and cost
- **Outputs:** Count and cost

Financial Metrics:

- **Total Budget:** Sum of all budgets allocated
- **Total Cost:** Sum of all costs incurred

Section 2: Activity Status Breakdown

Six status cards showing:

- **Pending** (Yellow) - Activities awaiting action
- **Active** (Blue) - Currently ongoing activities
- **Submitted** (Cyan) - Activities submitted for review
- **Approved** (Green) - Approved activities
- **Rated** (Gray) - Completed and rated activities
- **Total** (Dark) - Total activities count

Section 3: Interactive Charts

Chart 1: Province Distribution (Horizontal Bar Chart)

- Shows top 10 provinces by activity count
- Blue color scheme
- Hover for exact counts
- Auto-scales based on data

Chart 2: Activity Type Distribution (Doughnut Chart)

- Shows 7 activity types
- Color-coded segments
- Legend on right side
- Hover for percentages

Chart 3: Monthly Trends (Dual-Axis Line Chart)

- Last 12 months historical data
- Blue line: Activity Count (left Y-axis)
- Red line: Total Cost (right Y-axis)
- Smooth curved lines
- Interactive tooltips

Section 4: Top Performers

Top 5 Supervisors:

- Ranked by activity count
- Shows name and count
- Links to supervisor profile

Top 5 Action Officers:

- Ranked by activity count
- Shows name and count
- Links to action officer profile

Interpreting Dashboard Data

Status Breakdown:

- **High Pending count:** May indicate implementation delays
- **High Submitted count:** May indicate approval bottleneck
- **High Approved count:** Good progress, awaiting evaluation
- **High Rated count:** Excellent - activities completed and evaluated

Province Distribution:

- **Even distribution:** Good geographic coverage
- **Concentration in few provinces:** May indicate coverage gaps
- **Zero in some provinces:** Requires attention

Monthly Trends:

- **Upward trend:** Increasing activity implementation
- **Downward trend:** May indicate issues or seasonal variation
- **Cost vs. Activity correlation:** Shows spending efficiency

Top Performers:

- **Recognize high performers:** For motivation and best practice sharing
- **Support low performers:** May need training or resources

How This Feature Appears in Reports:

Statistics dashboard is a standalone feature but data comes from:

- All activities across the system
- All workplans
- All users (for top performers)

- Government structure (for province distribution)

Additional Important Information:

Tips and Best Practices:

- **Check dashboard daily** for real-time insights
- **Use date filters** to analyze specific periods
- **Compare months** to identify trends
- **Export charts** (screenshot) for presentations
- **Share insights** with management
- **Act on bottlenecks** identified in status breakdown

Common Mistakes to Avoid:

- Don't ignore status breakdown warnings
- Don't misinterpret monthly trends without context
- Don't compare different time periods without adjusting filters
- Don't forget that filters affect all sections

Troubleshooting:

- **Charts not loading:** Check browser JavaScript is enabled
- **Data seems wrong:** Verify filters are set correctly
- **Slow loading:** Reduce date range
- **Charts not interactive:** Update browser to latest version

Related Features:

- **All Reports:** Statistics summarize data from all reports
- **Activity Management:** Activities feed into statistics
- **Workplan Management:** Workplans feed into statistics

Permissions:

- **As Administrator:** You see system-wide statistics
- **Branch filter** allows you to focus on specific branches
- **All data** is visible to you regardless of filters

SME Management Features

SME (Small and Medium Enterprise) Management allows you to register and track agricultural enterprises and their staff.

Feature: SME Registration & Management

Feature Description:

The SME Registration & Management feature allows you to register small and medium agricultural enterprises, track their locations, manage their information, and link them to activities. Each SME can have multiple staff members registered.

Purpose and Benefits:

- Tracks number of SMEs supported
- Documents SME locations and coverage
- Records SME contact information
- Enables SME-focused activity planning
- Supports SME performance tracking
- Facilitates SME impact assessment
- Enables SME network development

How to Access This Feature:

1. From Dashboard, click **"SMEs"** in the left sidebar
2. You'll see the SMEs Index page with a list of all registered SMEs
3. Click **"New SME"** button (top right) to register a new SME

How to Use This Feature:

Registering a New SME

Step 1: Click "New SME" Button

- Located at the top right of the SMEs Index page
- Opens the SME Registration form

Step 2: Fill in SME Information

Basic Information (Required):

- **SME Name:** Official name of the enterprise

- **Description:** What the SME does, products/services offered

Location Information (Required):

- **Province:** Select from dropdown
- **District:** Select from dropdown (filtered by province)
- **LLG:** Select from dropdown (filtered by district)
- **Village Name:** Name of the village where SME is located

Contact Information:

- **Contact Details:** Phone numbers, email addresses
- **GPS Coordinates:** Latitude and longitude (optional but recommended)
    - Format: "Latitude, Longitude" (e.g., "-6.314993, 143.955550")

Logo Upload (Optional):

- **SME Logo:** Upload enterprise logo
    - Supported formats: JPG, PNG, JPEG
    - Maximum file size: 2MB
    - Recommended: Square image, 500x500 pixels

Step 3: Click "Create SME"

- System validates all required fields
- SME is registered with status "Active"
- Logo is uploaded to server (path: public/uploads/sme_logos/)
- You're redirected to the SME Details page

Viewing SMEs

From SMEs Index:

1. Navigate to **SMEs**
2. View complete list of all registered SMEs
3. Use search box to find specific SMEs
4. Click **"View"** button to see SME details

SME Details Page Shows:

- SME name and description
- Location (province, district, LLG, village)

- Contact details
- GPS coordinates
- Logo (if uploaded)
- Status
- Staff count
- Linked activities count
- Registration date

Editing SMEs

1. From SME Details page, click **"Edit"** button
2. Modify any fields
3. Update logo if needed
4. Click **"Update SME"**
5. Changes are saved

Managing SME Status

Changing Status:

1. From SME Details page, click **"Toggle Status"** button
2. Add remarks explaining status change
3. Confirm status change
4. Status toggles between "Active" and "Inactive"

Status Meanings:

- **Active:** SME is currently operational and supported
- **Inactive:** SME is no longer operational or not currently supported

Deleting SMEs

1. From SME Details page, click **"Delete"** button
2. Confirm deletion in popup dialog
3. SME is soft-deleted (not permanently removed)
4. SME staff are also soft-deleted
5. Linked activities are preserved

Note: Deletion is rarely needed - changing status to "Inactive" is preferred

Managing SME Staff

Step 1: Access Staff Management

- From SME Details page, click **"Manage Staff"** button
- Opens SME Staff page

Step 2: Add New Staff Member

- Click **"New Staff"** button
- Opens Staff Registration form

Step 3: Fill in Staff Information

Personal Information (Required):

- **First Name:** Staff member's first name
- **Last Name:** Staff member's last name
- **Gender:** Select Male or Female
- **Date of Birth:** Staff member's birth date (date picker)

Employment Information (Required):

- **Designation:** Job title/position in the SME
- **Contact Details:** Phone number, email

ID Photo (Optional):

- **ID Photo:** Upload staff member's photo
  - Supported formats: JPG, PNG, JPEG
  - Maximum file size: 2MB
  - Recommended: Passport-style photo

Step 4: Click "Create Staff"

- Staff member is registered with status "Active"
- Photo is uploaded to server (path: public/uploads/sme_staff_photos/)
- You're redirected to the SME Staff page

Viewing Staff:

- From SME Details, click "Manage Staff"
- View list of all staff members for this SME

- Click "View" to see staff details

Editing Staff:

- From Staff Details, click "Edit"
- Modify information
- Click "Update Staff"

Deleting Staff:

- From Staff Details, click "Delete"
- Confirm deletion
- Staff is soft-deleted

How This Feature Appears in Reports:

SME information appears in:

1. **Activity Maps**
   - SME locations shown on map
   - Activities linked to SME locations
2. **Statistics Dashboard**
   - SME count metrics
   - SME distribution by province
3. **Custom SME Reports** (if implemented)
   - SME listing with details
   - SME performance metrics
   - Staff capacity assessments

Additional Important Information:

Tips and Best Practices:

- **Verify SME information** before registration
- **Upload logos** for better identification
- **Record GPS coordinates** for accurate mapping
- **Keep contact details updated**
- **Register all staff members** for capacity tracking
- **Update status** when SME closes or becomes inactive
- **Link activities** to SME locations when relevant

Common Mistakes to Avoid:

- Don't create duplicate SMEs - search first
- Don't skip location information
- Don't forget to add staff members
- Don't delete SMEs unless absolutely necessary (change status instead)

Troubleshooting:

- **Logo not uploading:** Check file size and format
- **GPS coordinates not saving:** Check format (Latitude, Longitude)
- **Can't find SME in activity form:** Check SME status is "Active"
- **Staff photo not displaying:** Check image format and size

Related Features:

- **Activity Creation:** Can link activities to SME locations
- **Activity Maps:** Shows SME locations on map
- **Government Structure:** Provides location hierarchy for SMEs

Permissions:

- **As Administrator:** You can create, view, edit, and delete ANY SME
- **You can manage** all SME staff
- **You can change** SME status

Duty Instructions Features

Duty Instructions allow you to create detailed task assignments with specific instructions and deadlines.

Feature: Duty Instruction Creation & Management

Feature Description:

Duty Instructions provide a system for creating and managing work assignments with detailed instructions, deadlines, and supervisor oversight. Each duty instruction can have multiple instruction items (specific tasks).

Purpose and Benefits:

- Breaks down activities into specific tasks
- Assigns clear responsibilities
- Sets deadlines for task completion

- Enables task-level progress tracking
- Supports detailed work planning
- Facilitates supervisor oversight of specific tasks
- Improves accountability at task level
- Enables granular performance measurement

How to Access This Feature:

1. From Dashboard, click **"Duty Instructions"** in the left sidebar
2. You'll see the Duty Instructions Index page
3. Click **"New Duty Instruction"** button to create

How to Use This Feature:

Creating a Duty Instruction

Step 1: Click "New Duty Instruction" Button

- Opens Duty Instruction Creation form

Step 2: Fill in Duty Instruction Information

Required Fields:

- **Workplan:** Select workplan this duty instruction relates to
- **Supervisor:** Select supervisor who will oversee this duty instruction
- **Duty Instruction Number:** Unique identifier (e.g., "DI-2025-001")
- **Duty Instruction Title:** Brief title describing the duty
- **Duty Instruction Description:** Detailed description of what needs to be done

Auto-Filled Fields:

- **User:** Automatically set to logged-in user (you)
- **Status:** Automatically set to "Active"

Step 3: Click "Create Duty Instruction"

- Duty instruction is created
- You're redirected to Duty Instruction Details page

Adding Instruction Items

Step 1: Access Duty Instruction Details

- Navigate to Duty Instructions
- Click "View" on a duty instruction

Step 2: Click "Add Instruction Item" Button

Step 3: Fill in Instruction Item Information

Required Fields:

- **Instruction Number:** Item number (e.g., "1", "2", "3")
- **Instruction:** Specific task or instruction
- **Remarks:** Additional notes, deadline, or requirements

Step 4: Click "Add Item"

- Instruction item is added
- Appears in the instruction items list

Repeat for each specific task within the duty instruction

Viewing Duty Instructions

From Duty Instructions Index:

1. Navigate to **Duty Instructions**
2. View list of all your duty instructions
3. Filter by:
   - Workplan
   - Supervisor
   - Status
4. Click **"View"** to see details

Duty Instruction Details Page Shows:

- Duty instruction number, title, description
- Workplan linked to
- Supervisor assigned
- User (action officer)
- Status
- List of instruction items
- Creation and update dates

Editing Duty Instructions

1. From Duty Instruction Details, click **"Edit"** button
2. Modify fields
3. Click **"Update Duty Instruction"**

Editable Fields:

- Title and description
- Supervisor
- Workplan

Non-Editable Fields:

- Duty instruction number
- User (action officer)

Editing Instruction Items

1. From Duty Instruction Details, find the instruction item
2. Click **"Edit"** button next to the item
3. Modify instruction or remarks
4. Click **"Update Item"**

Deleting Duty Instructions

1. From Duty Instruction Details, click **"Delete"** button
2. Confirm deletion
3. Duty instruction and all its items are soft-deleted

Deleting Instruction Items

1. From Duty Instruction Details, find the instruction item
2. Click **"Delete"** button next to the item
3. Confirm deletion
4. Instruction item is soft-deleted

How This Feature Appears in Reports:

Duty instructions may appear in:

1. **User Performance Reports** (if implemented)

- Duty instructions assigned to users
- Completion rates

2. **Workplan Reports**
    - Duty instructions linked to workplans
    - Task breakdown

Additional Important Information:

Tips and Best Practices:

- **Be specific in instructions** - clear tasks are easier to complete
- **Number items logically** - in order of execution
- **Set realistic deadlines** in remarks
- **Link to relevant workplan** for context
- **Assign appropriate supervisor** for oversight
- **Break down complex work** into multiple items
- **Update status** as work progresses

Common Mistakes to Avoid:

- Don't create vague instructions
- Don't forget to add instruction items
- Don't skip deadline information in remarks
- Don't assign supervisors who aren't available

Troubleshooting:

- **Can't create duty instruction:** Check all required fields are filled
- **Workplan dropdown empty:** Create workplans first
- **Supervisor dropdown empty:** User may not have supervisor capability

Related Features:

- **Workplan Management:** Duty instructions link to workplans
- **Activity Management:** Duty instructions support activity implementation
- **User Management:** Supervisors and users are assigned

Permissions:

- **As Administrator:** You can create, view, edit, and delete ANY duty instruction
- **You can assign** any supervisor
- **You can create** duty instructions for any workplan

Evaluation & Rating Features

Evaluation features allow you to assess activity quality and effectiveness through rating and feedback.

Feature: Activity Evaluation System

Feature Description:

The Activity Evaluation System allows evaluators (M&E staff) to access all workplans, view activities, and rate activity quality and effectiveness. Provides percentage-based rating (0-100%) with detailed remarks.

Purpose and Benefits:

- Assesses quality of activity implementation
- Measures achievement of activity objectives
- Provides independent quality assurance
- Identifies areas for improvement
- Supports evidence-based decision making
- Enables performance-based management
- Facilitates learning and improvement
- Provides accountability for results

How to Access This Feature:

1. From Dashboard, click **"Evaluation"** in the left sidebar
2. You'll see the Evaluation page with list of all workplans
3. Click **"View Activities"** on a workplan to see its activities
4. Click **"View Outputs"** on an activity to see linked activities
5. Click **"Rate Activity"** to provide rating

How to Use This Feature:

Accessing Activities for Evaluation

Step 1: Navigate to Evaluation

- Dashboard → Evaluation

Step 2: View Workplans

- See list of all workplans across the system

- Workplan details shown:
  - Workplan title
  - Branch
  - Supervisor
  - Start and end dates
  - Status

Step 3: View Activities in a Workplan

- Click **"View Activities"** on any workplan
- See list of all activities within that workplan
- Activity details shown:
  - Activity code
  - Activity title
  - Target output
  - Budget
  - Status

Step 4: View Activity Outputs

- Click **"View Outputs"** on any activity
- See all linked activities (outputs) for that workplan activity
- Review implementation details for each output

Rating an Activity

Step 1: Access Rating Form

- From Activity Outputs page, click **"Rate Activity"** button
- Opens rating form

Step 2: Review Implementation Details

- Review all implementation information
- Check supporting documents and photos
- Assess quality of implementation
- Verify beneficiary data
- Check cost information

Step 3: Provide Rating

Rating Field (Required):

- **Rating Percentage:** Enter value from 0 to 100
  - 0-40%: Poor implementation
  - 41-60%: Fair implementation
  - 61-80%: Good implementation
  - 81-100%: Excellent implementation

Remarks Field (Optional but Recommended):

- **Rating Remarks:** Provide detailed feedback
  - What was done well
  - Areas for improvement
  - Recommendations
  - Observations

Step 4: Click "Submit Rating"

- Rating is saved
- Activity status changes to "Rated"
- Rating percentage and remarks are recorded
- Rated by (your name) and rated at (timestamp) are logged
- Email notifications sent to action officer and supervisor

Updating Ratings

If you need to change a rating:

1. Navigate back to the activity
2. Click **"Rate Activity"** again
3. Modify rating percentage and/or remarks
4. Click **"Submit Rating"**
5. Rating is updated with new values

Note: Rating history is maintained (previous ratings are logged)

Viewing Rated Activities

Filter by Rating Status:

1. From Evaluation page, use filters to show:
   - Rated activities (have rating)
   - Unrated activities (no rating yet)
2. Sort by rating percentage to identify:

- Highest rated activities
- Lowest rated activities

How This Feature Appears in Reports:

Evaluation data appears in:

1. **Workplan Reports**
   - Shows rating percentages for activities
   - Displays rated vs. unrated counts
   - Calculates average rating by workplan
2. **Statistics Dashboard**
   - Count of rated activities
   - Average rating across all activities
   - Rating distribution
3. **Activity Reports**
   - Rating column shows percentage
   - Rating remarks displayed
   - Rated by and rated at information

Additional Important Information:

Tips and Best Practices:

- **Review thoroughly** before rating - ratings inform decisions
- **Be objective** in your assessment
- **Provide constructive feedback** in remarks
- **Use consistent criteria** across all evaluations
- **Document your methodology** for transparency
- **Rate promptly** after activity approval
- **Follow up** on low-rated activities
- **Recognize excellence** in high-rated activities

Common Mistakes to Avoid:

- Don't rate without reviewing implementation details
- Don't provide ratings without remarks
- Don't use only extreme ratings (0 or 100)
- Don't let personal bias affect ratings
- Don't delay evaluation - rate promptly

Troubleshooting:

- **Can't access evaluation:** Check you have evaluator capability
- **Can't rate activity:** Check activity status is "Approved"
- **Rating not saving:** Check rating is between 0 and 100
- **Can't see all workplans:** Refresh page or check permissions

Related Features:

- **Activity Management:** Activities must be approved before rating
- **Supervised Activities:** Supervisors approve before evaluation
- **Reports:** Ratings appear in multiple reports

Permissions:

- **As Administrator:** You can evaluate ANY activity
- **You can update** any rating
- **You can view** all evaluation data

Email Notifications:

- **On rating:** Action officer receives notification
- **On rating:** Supervisor receives notification
- **On rating update:** Notifications sent again

Data Validation:

- **Rating** must be numeric between 0 and 100
- **Remarks** are optional but recommended
- **Activity** must have status "Approved" to be rated

Supervision Features

Supervision features enable you to oversee workplans and activities, approve submissions, and provide guidance.

Feature: Supervised Activities Management

Feature Description:

Supervised Activities Management allows supervisors to view and manage all activities assigned to them for supervision. Provides oversight of activity implementation and approval workflow.

Purpose and Benefits:

- Ensures activities meet quality standards before approval
- Provides guidance and feedback to action officers
- Identifies issues early in implementation
- Supports timely intervention when needed
- Improves activity implementation quality
- Facilitates knowledge transfer
- Enables performance coaching

How to Access This Feature:

1. From Dashboard, click **"Supervised Activities"** in the left sidebar
2. You'll see list of all activities where you're assigned as supervisor
3. Filter and view activities needing your attention

How to Use This Feature:

Viewing Supervised Activities

Step 1: Navigate to Supervised Activities

- Dashboard → Supervised Activities

Step 2: View Activities List

- See all activities assigned to you as supervisor
- Activities shown regardless of status

Step 3: Apply Filters

Available Filters:

- **Status:** Filter by activity status
  - Pending
  - Active
  - Submitted (activities awaiting your approval)
  - Approved
  - Rated
- **Activity Type:** Filter by type (7 types)
- **Date Range:** Filter by activity dates

Step 4: Focus on Submitted Activities

- Filter by Status: "Submitted"

- These activities need your review and approval

Reviewing an Activity

Step 1: Click "View" on an Activity

- Opens Activity Details page

Step 2: Review Activity Information

- Check activity details (title, description, location, dates)
- Verify budget and cost information
- Review strategic plan linkages

Step 3: Review Implementation Details

- Check implementation information specific to activity type
- Review uploaded documents and photos
- Verify beneficiary data (if applicable)
- Check participant lists (if applicable)
- Assess quality of evidence

Step 4: Make Decision

- Decide whether to approve or send back for revision

Approving an Activity

Step 1: From Activity Details, Click "Approve" Button

- Opens approval confirmation dialog

Step 2: Add Remarks (Optional but Recommended)

- Provide positive feedback
- Acknowledge good work
- Note any observations

Step 3: Click "Confirm Approval"

- Activity status changes to "Approved"
- Approval timestamp and your name are recorded
- Email notification sent to action officer

- Activity is now ready for evaluation

Sending Back for Revision

Step 1: From Activity Details, Click "Send Back for Revision" Button

- Opens revision dialog

Step 2: Add Remarks (Required)

- Clearly explain what needs to be corrected
- Provide specific guidance
- List items that need improvement
- Be constructive and helpful

Step 3: Click "Confirm Send Back"

- Activity status changes back to "Active"
- Your remarks are saved
- Email notification sent to action officer with your remarks
- Action officer can now revise and resubmit

Monitoring Supervised Activities

Dashboard Metrics:

- Your dashboard shows:
  - Pending tasks (submitted activities awaiting approval)
  - Completed tasks (approved/rated activities)

Regular Review:

1. Check Supervised Activities daily
2. Filter by "Submitted" status
3. Review and approve/send back promptly
4. Monitor overall progress of your supervised activities

How This Feature Appears in Reports:

Supervision data appears in:

1. **Workplan Reports**
   - Shows supervisor name for each workplan

   - Displays approval rates by supervisor
2. **Statistics Dashboard**
   - Top supervisors by activity count
   - Supervisor performance metrics
3. **Activity Reports**
   - Supervisor name shown for each activity
   - Approval status and dates

Additional Important Information:

Tips and Best Practices:

- **Review promptly** - don't let activities sit too long
- **Be thorough** in your review
- **Provide clear feedback** when sending back
- **Acknowledge good work** when approving
- **Check evidence** (photos, documents) carefully
- **Verify beneficiary data** is realistic
- **Monitor your pending tasks** regularly
- **Communicate with action officers** if issues arise

Common Mistakes to Avoid:

- Don't approve without reviewing implementation details
- Don't send back without clear, specific remarks
- Don't delay approvals unnecessarily
- Don't be too lenient or too strict - be fair and consistent

Troubleshooting:

- **Can't see supervised activities:** Check you're assigned as supervisor
- **Can't approve activity:** Check activity status is "Submitted"
- **Approval not saving:** Refresh page and try again
- **Email not sent:** Check action officer's email address

Related Features:

- **Activity Management:** Activities you supervise
- **Workplan Management:** Workplans you supervise
- **Evaluation:** Approved activities go to evaluation

Permissions:

- **As Administrator:** You can supervise ANY activity
- **You can approve** activities even if not assigned as supervisor
- **You can override** any supervision decision

Email Notifications:

- **On submission:** You receive email when activity is submitted
- **On approval:** Action officer receives email
- **On send back:** Action officer receives email with your remarks

Business Logic:

- **Only "Submitted" activities** can be approved or sent back
- **Approval** changes status to "Approved"
- **Send back** changes status to "Active"
- **Remarks are required** when sending back
- **Remarks are optional** when approving

Conclusion

Congratulations! You've completed the AMIS System Administrator Tutorial. You now have comprehensive knowledge of all features available to you as an administrator.

Key Takeaways

Your Responsibilities:

- System configuration and master data management
- User account management and activation
- Strategic plan management
- SME registration and management
- Full activity lifecycle management
- Comprehensive reporting and analytics
- System oversight and data quality

Your Capabilities:

- **Full Access:** All features and all data
- **Override Permissions:** Can perform any action
- **System-Wide Visibility:** See all branches and users

- **Administrative Control:** Manage users, master data, and configuration

Next Steps

1. **Practice:** Use the system regularly to become proficient
2. **Explore:** Try all features to understand their capabilities
3. **Train Others:** Help users understand their roles
4. **Monitor:** Check statistics dashboard regularly
5. **Maintain:** Keep master data updated
6. **Support:** Assist users with issues and questions

Getting Help

If you encounter issues:

1. Check this tutorial for guidance
2. Review error messages carefully
3. Check your permissions and role
4. Contact IT support if technical issues persist
5. Refer to other documentation in `dev_guide/` folder

Best Practices Summary

✅ Do:

- Keep master data updated
- Activate users promptly
- Review pending approvals regularly
- Monitor system statistics
- Provide clear feedback
- Document your processes
- Train users effectively

❌ Don't:

- Delete data unnecessarily (use deactivation)
- Share your admin password
- Approve without reviewing
- Ignore pending tasks
- Skip strategic plan linkages

- Forget to backup data regularly

System Goal Reminder

Always remember the primary objective: **Monitor and Measure the effectiveness of activities implemented and how they contribute to achieving the targets in the plans.**

As an administrator, you enable this goal by:

- Ensuring proper system configuration
- Enabling users to do their work
- Maintaining data quality
- Providing oversight and guidance
- Generating insights through reports

Thank you for using AMIS!

Document End